

Toward Equality

by Quentin Deluermoz

Inequality has a history that is always complex and often contradictory. The story needs to be told, because it is this story, enriched by the contributions of all the social sciences, that can help to shape realistic proposals for greater social justice.

Reviewed: Thomas Piketty, *Une brève histoire de l'égalité*, Paris, Seuil, 2021, 368 pp., €14. English translation: *A Brief History of Equality*, Harvard University Press, 2022.

At a time when surveys universally confirm that global inequalities have been rising since the 1980s, how can we get back on the path towards more equitable conditions, and which historical trajectory should we follow? This is the task set by this "brief history of equality". Thomas Piketty needs no introduction: the French economist is the author of a vast body of work, widely recognized and translated into numerous languages, and is also a regular contributor to national and transnational public debate. This book is a direct continuation of his previous two. *Capital in the Twenty-First Century* examined the rise and mechanisms of inequality in Western countries in the 20th and 21st centuries, while *Capital and Ideology* explored the depth of these unequal logics over the long term and on a global scale. This book, which is both shorter and more optimistic, proposes specific solutions for overcoming the profound crisis currently facing the world's societies.

A pedagogy of indicators

The book bears the hallmark of its author's major proposals: economics is not seen as a closed discipline, but as an integral part of a broader social science approach that includes sociology, anthropology, political science, law, philosophy and history. Furthermore, this approach combines the long term with a global perspective, linking macro-historical perspectives with case studies, comparisons and a focus on unrealized possibilities. It places great emphasis on the social sciences, both in terms of the breadth of subjects covered and the search for concrete solutions to a number of contemporary problems.

The emphasis on sharing is clear from the outset. The book makes available the results of various surveys, and explains how economists and social science researchers work: it gives definitions, clarifies lines of reasoning, and guides the reader through tables and graphs. Readers can learn more about works that have become classics among specialists, such as Kenneth Pomeranz's *The Great Divergence* (2000) and Sven Beckert's *Empire of Cotton* (2014). History plays a key role, particularly economic and social history, the history of struggles and revolutions, the history of capitalism and the distribution of wealth; but the book also introduces us to numerous works in sociology, law, political science and anthropology. The pedagogy of economic indicators is particularly enlightening. When discussing those most commonly mobilized, the author reminds us that they are the product of choices and constructs, and have an impact on our vision of the world. He then shows how integrating other criteria (environmental, social, skin color) requires inventiveness, political choice and critical distance. This concern for honesty and scientific transparency is especially important given that Thomas Piketty's argument is based on the database he helped to create: the World Inequality Database (WID.world), which brings together data on income distribution and wealth for 80 countries over three centuries (18th-21st). Together, the issues, readings and data form the basis of this history.

From the 18th to the 21st century: the thwarted march of equality

It takes the form of a historical macro-narrative that does not gloss over its irregularities and uncertainties. In terms of inequality, the first observation over two

centuries is that progress has been made. Average global life expectancy at birth has risen from 26 years in 1820 to 72 years today, while average income has increased 10-fold since the 18th century. In contrast, the concentration of property ownership in France fell steadily from its peak in the 1900s to the 1980s, before rising again. A wealthy middle class emerged over the same period, while income inequalities tended to decline. Of course, the poorest 50% still own almost nothing, and the income gap between the poorest 50% and the richest 10% remains 1 to 8: this movement is a trend and is by no means natural.

This trend is indeed the result of a history, a history that has been thwarted by multiple balances of power and heritages that need to be brought to light. The European project, for example, cannot be dissociated from global dynamics. For this "Great Divergence" was made possible by land use in North and South America and the West Indies (as well as by the transfer of African populations to these lands). War also played a critical role. In other words, European domination, industrial development and social transformation are inextricably linked to slave extraction in Saint-Domingue, protectionist measures imposed on Indian textiles, and the control of foreign debts. The recent history of capitalism and trans-imperial history, however, suggest that we should abandon the idea of a single European "center": the means of this structural reorientation are in fact not specific to Europe, but Europe's particularity is the extent and duration of its domination. It corresponds to a period in which new forms of state were being developed, exemplified by the nation-state, together with new types of interrelations and worldviews – many of which are largely unchanged to this day.

The end of slavery and colonialism were major milestones on the road to equality. But these historical experiences also caused long-lasting rifts that are still evident today. These include the debt of 150 million gold francs that Haiti had to repay to France and then the United States until 1950 after gaining independence (1804), or the compensation of several million pounds sterling or francs paid to slave owners after the abolition of slavery by Britain and France. These scars run deep and yet are commonplace, because colonial and slave-owning societies were characterized by extreme inequality, and the abolition of slavery paved the way for a complex continuum of labor situations between slavery and so-called free labor. This historical context once again raises the question of reparations, whether for specific countries or on a transnational scale, given the interconnectedness that underpins these inequalities. To undo the damage done by colonialism, continues Piketty, a systemic change in economic organization is undoubtedly required: for example, part of the

revenues of multinationals and billionaires should be taxed and paid back to the population as a whole.

Revolutions and the slow affirmation of social and political rights over the past two centuries have all been part of the same ambiguous movement. The French Revolution marked the end of a society of orders and privileges, and the birth of freedom and equal rights for all citizens. However, equality had its limits, because it excluded women and colonized populations. Furthermore, the reduction in social inequalities remained partial: the nobility retained large estates, while the redistribution of wealth was thwarted by the establishment of a so-called proprietary ideology. The struggles that led to the establishment of statutes, labor law and the wage-earning society within liberal and then democratic regimes over the following two centuries were unable to prevent the property-owning classes from adapting and reinventing plutocratic forms of power, as demonstrated by the current issues surrounding the financing of political parties and the media. Yet solutions do exist, particularly since the 2008 crisis: rules for sharing economic power have been proposed, such as 50% employee participation in the decisions of the largest companies, or the call to establish European and transnational trade union law.

In reality, observes Thomas Piketty, the core of this trend towards equality can be found in a specific period: the experience of the welfare states of the years 1914-1980, in Europe and the United States, which are at the heart of his analysis, and in different forms in Russia, China, India and Japan. As the fruit of social mobilization, wars and the Great Depression, but also the adoption by parliaments of progressive income and inheritance taxes, this welfare state was characterized by fiscal expansion and, above all, by a radical shift in spending away from sovereign functions towards education, health and social protection. During this profound "anthropological revolution" (p. 127), the welfare state also partially escaped the control of the ruling classes. This is how economic development and human progress can go hand in hand. This "great redistribution" (p. 121) was accompanied by other more or less related phenomena: international possessions and colonial assets were then reduced or liquidated as a result of revolutionary expropriations, wars of independence, fear of the USSR or the two world wars. The movement was completed with the collective decision by European states to cancel debts after 1945 – another major contemporary issue.

Reconnecting with history

While wealth disparities and the concentration of property have remained high – and both rose further with the free movement of capital in the 1980s – the welfare state and progressive taxation have historically proven their effectiveness in reducing inequality in liberal democracies. In light of this, the book sets out to explore the potential of this mechanism, among the many proposals aimed at finding a way out of today's capitalism. A number of specific measures are presented: for example, such a program would mean increasing progressive taxation, introducing a universal basic income, and, more ambitiously, establishing a system of employment guarantees, redistribution of inheritance and real power-sharing within companies. The aim is to establish a form of temporary social ownership and begin the decommodification of the economy. From a political point of view, there is no risk of sinking into the totalitarian and bureaucratic excesses of the Soviet regimes, since this form of "democratic socialism, decentralized and self-managing," (p. 155) would, on the contrary, lead to a strengthening of liberal democracy, with the question of the link between the different levels of intervention – centralized or decentralized – remaining open. Insofar as these socio-economic and political structures are interconnected, this also presupposes that the states in power would withdraw from free-trade treaties, redefine the rules of international trade and impose rules for social and environmental justice aimed, among other things, at rebalancing the North-South divide.

Social, gender and ethno-racial forms of discrimination are of course fundamental issues. Here, educational justice plays a crucial role. But if we want to establish a policy of positive discrimination based on social criteria, Piketty points out that, at the very least, we need to move away from negative discrimination, which means that in all OECD countries, the disadvantaged social classes benefit from fewer educational resources than the privileged classes. As for the rest, how effective can a quota policy be? Can it help to speed up the sluggish progress made in closing the gender gap, and modify the highly gendered organization of the world of work exposed by feminist economics? Can it tackle racial discrimination, which is increasingly well-documented but still under-assessed? The instrument appears difficult to implement. In any case, the criteria used must be the subject of transparent debate involving all the stakeholders concerned; above all, the whole process should be based on the preceding project to redistribute power and wealth.

Finally, the structural inequalities in the international economic system need to be addressed. Inequalities between countries have been declining since 1980, and the hierarchy of powers is beginning to shift with the rise of China. But structural inequalities remain high, and still bear the mark of the West's disengagement and the colonial legacy of the 19th and 20th centuries, while trade liberalization and tax havens prevent the poorest countries from strengthening their position. In the same spirit, the book suggests introducing a global tax of 2% on fortunes in excess of 10 million euros, and tracking capital flight. As for the welfare states, the key players in this regulation, they must no longer consider themselves as national states, as they did in the 20th century, but as federative states, and develop tools capable of adapting to the transnational organization of economic players and imperial logics. For example, they could adopt co-development treaties, or set up transnational or even transcontinental joint assemblies to discuss the regulations to be adopted in matters of labor law, migratory flows and environmental degradation.

This sweeping narrative allows the author to historicize the current state of the world and its pretenses, and to identify possible levers for action on a national, transnational and global scale. In so doing, it brings depth, direction and a sense of coherence to a set of proposals put forward in recent years (by Julia Cagé, Mireille Delmas-Marty, Bernard Friot, Dominique Méda, Pavlina R. Tcherneva, Bernie Sanders, Alexandria Ocasio-Cortez, etc.), which are also outlined in the book. But how can we break down the barriers and bring about this "democratic, ecological and multicultural socialism"? Social struggles and power relations are necessary, but the book also points to conditions of possibility that are specific to the current era: the increasingly visible effects of climate disruption (which a priori make it necessary to transform modes of production, consumption and exchange), and a dual movement made up of, on the one hand, the assertion of a Chinese authoritarian state socialism, and on the other, the undermining of neoliberal ideologies since the 2008 crisis. Piketty notes that there is still a (narrow) space in which to deploy this "model of cooperative development, based on universal values and objective, verifiable social and environmental indicators" (p. 244).

The many histories of equality

Bringing together a wealth of readings and clarifications, this short book presents an astonishingly wide-ranging panorama and project. As with any macro-

narrative, especially when it is, as in this case, linked to a political aim and concrete proposals, the book has its gaps and is the result of choices that are open to debate – a point the author readily accepts. For example, his progressive perspective on a 20th century usually portrayed in a gloomier light may come as a surprise, even if it has the merit of avoiding the bleak analyses that prevent any scope for action. Following in the footsteps of other great figures, such as Pierre Bourdieu in the 1980s, Thomas Piketty also attaches great importance to states in their capacity to respond to liberalization and regulate trade, even though he is proposing more diverse and connected institutional structures, whose modalities are as yet unspecified. On the other hand, despite making continual reference to the decisive role of struggles, mobilizations, social conflicts and revolutions, he pays them less attention in comparison. Yet it is here, in this area of conflict, that other histories of equality, and other ways of thinking about historical change, may play out.

Staying within the European framework, numerous social movements and experiments in the 19th century, in addition to Marx's criticisms, were already considering the question of gender relations, plural forms of ownership, the democratization of labor relations, and variable forms of democratic federalism with a universal aim. These thoughts and struggles could lend further historical consistency to the project of "democratic socialist federalism", which is not exclusive to the beginning of the 21st century. But the history of struggles, projects and achievements aimed at increasing equality stretches further back, and takes many different forms in time and space. In the Middle Ages, it drew on the resources of Christian culture. Staying within the era of industrialization, but in an area far removed from the European point of view, the peasants of the Bengal delta experienced a certain prosperity with the worldwide marketing of their jute sacks. Subsequently, at a time when they were suffering the full force of the global reorganization of material flows, Muslim culture provided them with the tools they needed to call for autonomy, the regulation of trade and greater equality, before finding political expression in the Krishak Praja Party¹. Here, other perspectives and a different, more anthropological and discontinuist history come to the fore, mobilizing other instruments and suggesting other concrete applications. In a recent issue on "*les fins de l'égalitarisme*" (the ends of egalitarianism), the journal of anthropology *L'Homme* drew up a preliminary assessment of research on equality, reminding us that the key issue in this field is no longer to consider so-called "other" societies as original reservoirs of

¹ Tariq Omar Ali, *A Local History of Global Capital: Jute and Peasant Life in the Bengal Delta*, Princeton: Princeton University Press, 2018.

"primitive egalitarianism", since they do not escape other forms of hierarchy and exclusion². On the basis of such observations, more and more studies are showing that trends towards equality, whether perennial or not, can be observed everywhere, over the long term and on a global scale.

As Judith Scheele points out (<https://laviedesidees.fr/Egalite-et-egalitarisme-en-anthropologie.html>), the task of researchers today is undoubtedly to bring to light the many possible combinations of links between equality and hierarchy, and in doing so to support the ongoing political inventiveness of human societies. In addition to wealth, status and property, the fields concerned by this question seem to extend beyond the usual framework of reflection to include, as in this case, gender and skin color, but also nature-culture relationships and even imaginative capacities. These are all questions that resonate with contemporary intellectual and political debates.

Thomas Piketty's narrative and proposals do not conflict with this panorama, but there are clearly many other possible histories of equality, within a plurality of conceivable modes of action, languages and institutional forms. Within the framework it has set itself, this concise essay nonetheless denaturalizes, by historical recourse, structural inequalities that seemed intangible; it also proposes regulatory and transformative measures linked to the current state of power distribution and integrated within the framework of liberal democracies. To the skeptics who may question their utopian nature, it will suffice to point out that these recommendations, which are oriented in a different direction, are essentially on the same scale as those generally put forward by so-called "neo-liberal" economists, which seem to be strikingly self-evident. Furthermore, one of the functions of utopias is precisely to break down the underlying mental frameworks that limit the possibility of change. In his reflections on utopia, sociologist Norbert Elias explained that the difference between the 16th and 20th centuries is that human beings, capable of going to the moon and feeding virtually the entire planet, now have the means to solve the challenges they faced³. The problem is indeed one of human organization, multifaceted and on a vast scale – an observation that is according to Elias the source of particular concern in the societies concerned.

In this sense, these proposals are on an appropriate scale, even for those who are interested only in the French context, which is so co-dependent with the rest of the

² « Les fins de l'égalitarisme », *L'Homme. Revue française d'anthropologie*, 236, 2020.

³ Norbert Elias, *L'utopie*, translated from German by Hélène Leclerc and from English by Delphine Moraldo and Marianne Woollven. Introduction and supervision of translations by Quentin Deluermoz, Paris, La Découverte, 2014.

world. Above all, at no point does the book impose its analyses and perspectives as the only solution; rather, it takes care to make them clear and open them up to shared discussion.

In so doing, Piketty has made an original contribution to a whole current of contemporary research on the question of equality⁴. His proposals will certainly be discussed. In setting out this far-reaching vision for lessening inequality, they certainly reflect a strong belief in democratic debate, parliamentary institutions and their capacity for transformation, precisely at a time when many citizens may no longer dare to believe in them, resulting in a general sense of resignation. On a more general level, at a time when nationalist isolationism is gaining ground and the dominant economy continues to appear as the natural backdrop to our lives, the fact that a researcher of this stature is reviving the figure of the intellectual to propose an alternative narrative and, in the current language of political effectiveness, potential prospects for change, is unquestionably a welcome development.

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⁴ For example, in two distinct genres, Alessandro Stanziani, *Capital Terre, une histoire longue du monde d'après (XII^e-XXI^e siècle)*, Payot, 2021; and Florent Guénard, *La passion de l'égalité*, Paris, Seuil, 2022.